



WELCOME

Based in Tulsa, Bartlesville and Oklahoma City, OK, SMS Financial and Investment Management is an SEC - registered investment adviser (RIA) that provides individuals, families, businesses and institutional clients with financial planning, investment advice, asset allocation strategies and portfolio construction recommendations. Our Founding Partners average nearly two decades of financial services experience and recognized the need for independence in 1994 to better serve clients.

We invite you to tour our site, where you can locate information on our firm, qualifications, services and other items - calculators and articles of interest.

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